

Business Formation Intake Sheet

Ament Law Group, P.C. — Free Initial Consultation

Fill in what you know — you do not need all the answers before we talk.

About You

First Name

Last Name

Phone (best)

Email

Current occupation / industry

The Business

Proposed business name (or working name)

What does the business do? (brief description)

Where will it operate?

Expected start date

Ownership

Solo owner

2 owners

3+ owners

Not decided yet

Owner Name	Ownership %	Role / Title	Full-time?

Entity Type Preference

LLC

S-Corporation

C-Corporation

Not sure — need guidance

Why are you leaning toward that choice?

Tax treatment, liability protection, ease of adding investors, and transferability all factor in

Tax & Financial

Have a CPA / accountant

Need a referral to an accountant

Will handle taxes myself

Fiscal year end (Dec 31?)

Expected annual revenue (rough estimate)

Will the business have employees right away?

Any investors or outside funding?

Existing Agreements & IP

Have a business plan

Have a draft operating agreement

Have a non-compete / NDA from None of the above

Any intellectual property — trademarks, patents, proprietary software?

Other Questions

Anything else you want to discuss at the consultation
